



## IT Procurement: Requests for Proposals

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## Introduction

- I. **Purpose.** This document covers VITA's Request for Proposals (RFP) policy and an overview of the technology sourcing process. All executive branch agencies and non-exempt institutions of higher education are subject to this policy, except those agencies and institutions explicitly exempted by the *Code of Virginia*.
- II. **Definition.** An RFP, or request for proposal, is the procurement method that uses competitive negotiation to obtain a solution to a business need.

## Policies- What you need to do

- III. **General Information.** VITA utilizes solution-based RFPs for IT procurements greater than \$50,000 or greater than \$30,000 upon discretion of the procurement officer. Solution-based RFPs focus on the need for a solution rather than identifying a specific good or service for the procurement. The RFP provides offerors with general information such as requirements, evaluation criteria and mandatory terms and conditions. Offerors respond to RFPs by providing solutions to the business need. If VITA determines to make an award, the offeror(s) providing the best value to the Commonwealth will be awarded the contract.
- IV. **Authority for RFPs.** VITA maintains authority for RFPs for information technology goods and services; therefore, agencies must forward solicitation requests to VITA. Prior to submitting a solicitation request, agencies should review the statewide technology contracts available on VITA's website to determine if a contract is available for the technology good or service to be procured. In order to initiate a solicitation request, contact SCM's Associate Director using contact information on [SCM's page](#) of the VITA Web site.

If VITA delegates the RFP, agencies must utilize VITA's technology sourcing process and guidance. VITA reserves the right to review an agency's delegated procurements, resulting contracts and processes and make

recommendations to an agency's procurement director and CIO to ensure consistency and utilization of best practices.

- V. **Justification/Documentation.** RFPs may be appropriate when the solution is not yet defined or when price is not the sole determining factor. When competitive negotiation is used, a written explanation is required in advance of the procurement as to why competitive sealed bidding is not practicable or not fiscally advantageous. This written explanation should be placed in the procurement file.

#### **Technology Sourcing Process**

- VI. **Technology Sourcing Process.** VITA utilizes a technology sourcing process consisting of three phases: Requirements Definition, Negotiation and Execution.
- A. **Requirements Definition Phase.** In the Requirements Definition phase, information is collected in order to define the business need. After requirements have been clearly defined, an RFP has been prepared at the conclusion of this phase.
1. **Requirements-** Minimal required specifications should be used to state the Commonwealth's business need. SCM's RFP template utilizes a question and answer format to guide you through documenting requirements. Your SCM sourcing specialist will provide you with the appropriate template.
  2. **Terms and Conditions-** VITA will include standardized terms and conditions in the RFP, whenever possible. Mandatory terms and conditions will include those expressly required by the *Code of Virginia* and federal law. Other mandatory terms and conditions may be dictated by the technology solution being procured and the business owner. All other terms and conditions will be listed as "desirables" in the RFP solicitation document and will be subject to negotiation between the Commonwealth and offeror(s).
- B. **Negotiation Phase.** In the Negotiation phase, VITA issues an RFP and leads the evaluation and negotiation with selected offeror(s). At the end of this phase, a determination is made regarding which offeror(s) may receive a contract award.
1. **Changes/Modifications-** Any changes or modifications to the RFP will be issued in writing as an addendum and will be made available to all prospective offerors via notification on the eVA website. Offerors are strongly encouraged to check that site regularly for updates. Unless an RFP is amended in writing, it remains unchanged.
  2. **Proposal Evaluation-** An initial evaluation will be conducted to ensure "must haves" are met. Offerors not meeting "must haves" will be eliminated from further consideration. The evaluation team will then review RFPs based on "best value" evaluation factors contained in the solicitation document (e.g., suitability to requirements, performance history). A "short list" is determined after reviewing evaluation factors. Offerors on the short list may be asked to deliver presentations or demonstrations. Another

evaluation meeting may be held, and two or more offerors may be selected for negotiation.

3. Negotiation Sessions- Negotiations are conducted with each of the offerors selected. Negotiation allows modification of proposals, including price and negotiable terms and conditions. After negotiations have been conducted with each of the selected offerors, the Commonwealth may select the offeror(s) which, in its opinion, has made the best proposal. The Commonwealth is not required to furnish a statement explaining why a particular proposal was not deemed to be the most advantageous. A contract may be awarded to the offeror(s), and notice of award shall be posted in the manner prescribed in the terms or conditions of the RFP.

- C. Execution Phase. In the Execution phase, VITA awards the contract(s) and obtains the goods or services as specified in the contract(s). Ongoing supplier management also occurs during the Execution phase.

VII. **Authority References.**

§2.2-4301 of the *Code of Virginia*. Definitions of procurement terms

§2.2-4303 of the *Code of Virginia*. Establishes the methods of procurement.